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JUNE 20, 1988

CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

MYHREN OUT IN ATC MOVE

STATIONS STUDYING SYNDEX

SIGNIFICANT GAINS IN FIBER

SELLING LOCAL POLITICAL ADS

PAPERS ASSESS CABLE HOLDINGS

CLI'S TICKING BOMB: ENGINEERS RUSH TO COMPLY

CableVision

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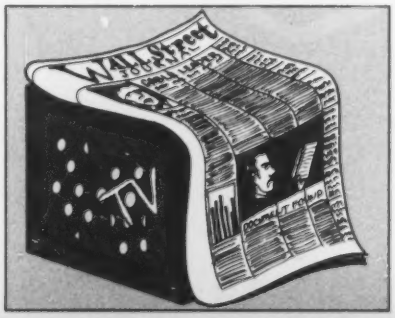
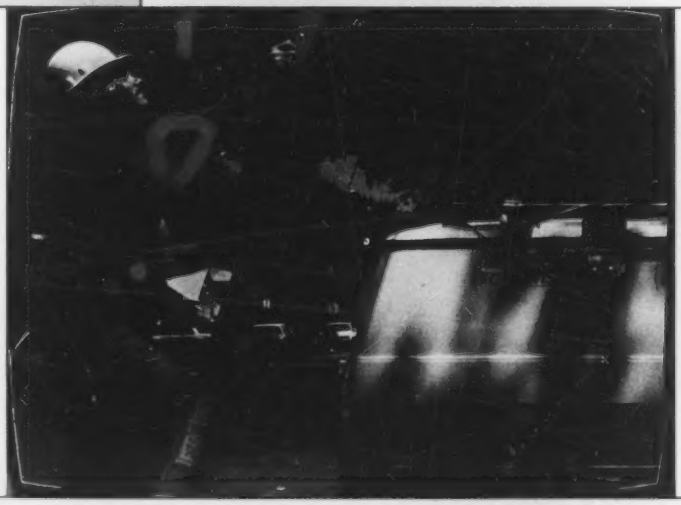


BUSINESS AND FINANCE

Papers happy in cable 56
Having gotten into the business for what turned out to be all the wrong reasons (i.e., videotex), one might think that major newspaper chains now would be anxious to move on to other things. But in reality the big chains remain quietly happy with their cable holdings and seem here to stay.



Tom Simendinger, field engineer for Cablevision Systems, checking for signal leakage in Woodbury, Long Island, the nation's largest cable system.
—Photo by Candace Drake

COVER STORY

Stop those leaks 42
1990 seemed so far away back in the early '80s, when the FCC ordered the cable industry to tighten up its leaking systems or risk losing use of aeronautical frequencies. Now the deadline looms closer and not many are in shape to meet the CLI requirements, which promises to be a major topic at this week's SCTE show.

BETWEEN THE LINES

Congress isn't toying with regulating TV

While it doesn't directly apply to cable, the Children's Television Act should be seen by the industry in the larger context of what the measure says about the current mood of Congress toward television. And that mood is anything but pleasant and forgiving.

That roughly four of every five members of the House of Representatives who cast votes felt that renewing a broadcaster's license should depend on whether the station provided educational and informational programming for children is abundant evidence that Washington's laissez-faire attitude toward the medium has ended. Mark Fowler's toaster-with-pictures ideology is dead; the public interest mandate has been given new life and can only grow stronger.

Sensing that it was up against a mom-and-apple pie issue, the National Association of Broadcasters did not oppose the bill, which passed by a margin of 328-78 and likely will sail through the Senate, after eliminating from it a provision mandating a daily hour of children's programming. A year ago, when it loudly was defending broadcasters' First Amendment rights, the NAB probably would have put up a fight. The broadcasters seem to be coming around to the view that acquiescing to a little regulation can be a good thing, especially when doing so improves chances for gaining a counter-balancing victory, in this case must-carry and other hedges against cable.

The Children's Television Act also offers an object lesson in trade association issues management, which is that often the battle is lost as soon as Congress becomes involved. Lobbying Members to oppose children's television is a difficult task. The same can be said of many cable issues, an understanding that has prevented undue rigidity from creeping into the spine of the National Cable Television Association.

At bottom the legislation is a frontal assault on the deregulation of television that has occurred during the Reagan Administration. License renewal, once a convoluted procedure that supported an entire class of Washington lawyers, was reduced to mailing in a post card. As the pendulum swings back toward greater regulation, it seems inevitable that the cable industry will be exposed to increasing assaults on deregulation.

And it could be that merely a suspicion that cable could be nicked by that swinging pendulum will affect the business. Would buyers and investers be as willing to pay the high prices that systems now command if they fear new restraints on pricing, packaging and the ability to select a channel lineup free of government intervention?

—Steve Tuttle
Editor and Associate Publisher

CableVision

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ABP BPA

What's on the Pays/June

Cinemax

New Movies

Title	MPAA Rating	Distributor
A Bell For Adano (B&W)	NR	20th Century-Fox
Belles On Their Toes	NR	20th Century-Fox
Between Heaven and Hell	NR	20th Century-Fox
Captain From Castile	NR	20th Century-Fox
84 Charring Cross Road*	PG	Columbia
The Cheap Detective	PG	Columbia
Commando Squad*	R	TWE Prod.
Commandos Strike at Dawn	NR	Columbia
Crash Dive	NR	20th Century-Fox
Daisy Kenyon (B&W)	NR	20th Century-Fox
Dolls	R	Vestron
Farewell, My Lovely	R	ITC Entertainment
Five Golden Hours (B&W)*	NR	Columbia
Forty Guns (B&W)	NR	20th Century-Fox
Gothic	R	Vestron
Guilty Conscience	NR	20th Century-Fox
A Hatful of Rain (B&W)	NR	20th Century-Fox
Hercules	G	J.E. Levine
Hercules Unchained	G	J.E. Levine
The Horseman*	PG	Columbia
In Old Chicago (B&W)	NR	20th Century-Fox
It's Alive III: The Island of the Alive*	R	Warner Bros.
Jeremiah Johnson	PG	Warner Bros.
Johnny Apollo (B&W)	NR	20th Century-Fox
Joy of Flying	NR	K-Pay
Hollywood Uncensored	NR	Castle Hill
Kentucky	NR	20th Century-Fox
The Kindred*	R	Feldman/Meeker
Kiss of Death (B&W)	NR	20th Century-Fox
L'Annee Des Meduses	NR	European Classics
Lloyds of London (B&W)	NR	20th Century-Fox
The Man From the Diner's Club (B&W)*	NR	Columbia
The Mark of Zorro (B&W)	NR	20th Century-Fox
Mister 880 (B&W)	NR	20th Century-Fox
Moon In Scorpio*	R	TWE Prod.
Munchies	PG	MGM/UA
Nightmare Alley	NR	20th Century-Fox
Off The Wall	R	Paramount
On the Line	NR	Miramax
The Outsiders	PG	Warner Bros.
Panic in the Streets (B&W)	NR	20th Century-Fox
Party Camp	R	Vestron
P.K. and the Kid	PG13	Castle Hill
Police Academy 4: Citizens on Patrol*	PG	Warner Bros.
Prisoners of the Casbah*	NR	Columbia
Radium City	NR	Praeses Prod.
The Raid	NR	20th Century-Fox
Rat Boy	PG13	Warner Bros.
Revolt of Mamie Stover	NR	20th Century-Fox
Russian Roulette	NR	ITC Entertainment
Serpent of the Nile*	NR	Columbia
Sex Appeal	R	Vestron
Slaughter High	R	Vestron
Sweet Country	R	Cinema Group
Sweet Lorraine	PG13	Paramount
The Tamarind Seed	PG	ITC Entertainment
Topper Takes a Trip	NR	Hal Roach
The Torture Garden*	NR	Columbia
13 West Street (B&W)*	NR	Columbia
What's Up, Tiger Lily?	PG	Castle Hill
Witchboard	R	Cinema Group
Wired To Kill	R	The Movie Store

Original Programming/Specials

Cinemax Sessions:
Country Music - A New Tradition
The Max Movie Show

Highlights

La Bamba* PG13 Columbia
Predator R 20th Century-Fox
Spaceballs PG MGM/UA

La Bamba

The Disney Channel

New Movies

All Mine To Give	NR	RKO
Angel and the Badman	NR	Hal Roach
Anna to the Infinite Power*	NR	Film Gallery
Archer*	NR	New World Pictures
Belles on Their Toes	NR	20th Century-Fox
Bloodhounds of Broadway	NR	20th Century-Fox
Charlie Smith and the Fritter Tree*	NR	WGBH Boston
The Deerslayer	NR	Viacom
Desk Set	NR	20th Century-Fox
For Heaven's Sake	NR	Viacom
Freaky Friday*	G	Disney
From the Earth to the Moon	NR	RKO
Glass Bottom Boat	NR	MGM/UA
Going Ape	PG	Paramount
Golden Girl	NR	20th Century-Fox
Jean Sheperd's 'Phantom of the Open Hearth'*	NR	WGBH Boston
Johnny Shiloh*	NR	Disney
Kavik, The Wolf Dog	NR	Viacom
The Kid From Spain	NR	Samuel Goldwyn
The Lonestar Kid*	NR	Wonderworks
Menace on the Mountain*	NR	Disney
Mr. Rossi's Dreams*	NR	Italtoons
My Friend Irma	NR	Paramount
Nadia	NR	Tribune Entertainment
Napoleon and Samantha	G	Disney
Pat and Mike	NR	MGM/UA
Peter No Tail	NR	Viacom
The Red Fury	PG	Dayton Steward Organization
Running Brave	PG	Disney
Soldier's Home	NR	Bedford Entertainment
Thinking Big	NR	Thinking Big Ltd.
Up the River	NR	20th Century-Fox
Vacationing With Mickey and Friends	NR	Disney
The Wind in the Willows	NR	D.L. Taffner Ltd.
The Wings of Eagles	NR	MGM/UA

Original Programming/Specials

Dr. Seuss on the Loose*
Dr. Seuss' The Lorax*
The Flame Trees of Thika* (Mini-Series)
Hepburn and Tracy*
Home Alone*
Wuzzles*

Wuzzles

Highlights

The Chipmunk Adventure* Samuel Goldwyn
Cowboys Don't Cry* Atlantis Films
Starlight: A Musical Movie Pride Entertainment

Home Box Office

New Movies

Angel Heart*	R	Tri-Star
Callie & Son	NR	Lorimar
Cave Girl	R	Crown
Crystal Heart*	R	New World
Disorderlies*	PG	Warner Bros.
Happy Hour	R	TMS
Hot Shot	PG	Internati
Instant Justice	R	James Phi
Jocks	R	Crown
Making Mr. Right	PG13	Orion
Mind Killer	NR	Fox/Lorber
Morgan Stewart's Coming Home*	PG13	Kings Road
Never Too Young To Die	R	Goldwyn
Pretty Smart*	R	New World
The Professionals*	PG	Columbia
Travels of Marco Polo*	NR	Taffner

Original Programming/Specials

The Adventures of Tom Sawyer
14: No School For Pirates*
15: Tom Steals Home*
16: Pirates At Their Own Funeral*
17: Tom's Moment of Glory*
18: For the Love of Becky*
Confessions of An Undercover Cop: America Undercover
HBO Comedy Hour Live: The Montreal Intl. Comedy Festival Hosted by John Candy
HBO Coming Attractions-8807
HBO World Stage: Olivia Newton-John in Australia
The Survival Series: 'Penguin Summer'*
Tales of Little Women
01: The March Family*
02: The War Draws Closer*
03: The Hidden Guest*
04: The Gift of Freedom*
05: The Friendship Pin*
Tanner '88: Part 8
Tanner '88: Part 9
Vietnam War Story: Part 4
Vietnam War Story: Part 5 World Championship Boxing: Marlon Starling vs. Tomas Molinares; Lloyd Honeyghan vs. Yungkil Chung

Olivia Newton-John

Highlights

Dragnet	PG13	Universal
The Fourth Protocol*	R	Lorimar
Predator**	R	20th Century-Fox
Spaceballs**	PG	MGM/UA

(**denotes duplicated and exclusive between Home Box Office and Cinemax)

The Movie Channel

New Movies

Above and Beyond (B&W)	NR	MGM/UA
The Adventures of the Action Hunters*	PG	Troma
The Amorous Adventures of Moll Flanders	NR	Paramount
Arabesque	NR	Universal
The Barbarians*	P.	Cannon
Battle Circus (B&W)	NR	MGM/UA
Calling Northside 777 (B&W)	NR	20th Century-Fox
Darling Lili*	NR	Paramount
Desk Set	NR	20th Century-Fox
The Diary of Anne Frank	NR	20th Century-Fox
Drums Along the Mohawk	NR	20th Century-Fox
Fairy Tales	R	Goldwyn
Heaven Can Wait	NR	20th Century-Fox
Help!*	G	Universal
How Green Was My Valley (B&W)	NR	20th Century-Fox
Jeremiah Johnson	PG	Warner Bros.
The Last Ride of the Dalton Gang	NR	Coca-Cola
Malaya	NR	MGM/UA
Mastermind	G	Viacom
The New Kids	R	Columbia
A New Kind of Love*	NR	Paramount
Nightside	NR	Universal
Off the Wall	R	Paramount
Outside Chance	NR	Viacom
Pacific Banana	R	Satori
A Piece of the Action	PG	Warner Bros.
R.S.V.P.	R	Platinum
Sheena	PG	Columbia
Summer Heat*	R	Atlantic
They Still Call Me Bruce	PG	Hal Roach
The Train Robbers	PG	Warner Bros.
The Washington Affair	NR	Viacom
What's Up, Tiger Lily?	PG	Castle Hill
Wolf at the Door	R	IFM
The 500 Pound Jerk	NR	Universal

Predator

Highlights

Back to the Beach*	PG	Paramount
Campus Man*	PG	Paramount
Dragnet	PG13	Universal
Hanoi Hilton*	R	Cannon
The Movie Channel's Short Film Showcase	NR	Showtime
Predator	R	20th Century-Fox

Showtime

New Movies

Angel on My Shoulder	NR	Viacom
Between Two Loves	NR	J. Phillips
Brass Target	PG	MGM/UA
Bus Stop	NR	20th Century-Fox
Candy Stripe Nurses	R	Viacom
Dragnet	PG13	Universal
The Far Horizons	NR	Paramount
Hey There, It's Yogi Bear*	G	Atlantic
The Legend of Sleepy Hollow	NR	Viacom
Madame X	NR	Universal
My Father, My Rival	NR	Scholastic
Ninja III: The Domination	R	Viacom
Paper Moon*(B&W)	PG	Paramount
Predator	R	20th Century-Fox
The Reluctant Astronaut	NR	Universal
The Return of Joe Forrester	NR	Coca-Cola
Rousters	NR	Coca-Cola
Sweet Bird of Youth	NR	MGM/UA
Sweet Lorraine*	PG13	Paramount
Sweet Revenge	R	New Horizons
True Grit	G	Paramount
The Wings of Eagles	NR	MGM/UA

Original Programming/Specials

Brothers: 'Barney, We Hardly Knew Ye...?'
Gleason: He's the Greatest
It's Garry Shandling's Show
Poison 'Chills'
Poison 'Bliss'
Showtime Championship Boxing
Showtime Comedy Club Network

Dragnet

Highlights

Back to the Beach**	PG	Paramount
Hot Pursuit*	PG13	Paramount
Malone*	R	Orion
The Sins of the Father (Part 1 +2)	NR	Showtime
Under Cover*	R	Cannon

(**denotes duplicated and exclusive between Showtime and TMC)
Note: Movies listed are making their debut on one or more pay services this month.

Cable posts 24.3% growth over two years

Study puts annual industry revenues at $12.8 billion

By Craig Kuhl

DENVER—In the past two years the cable industry has enjoyed a 24.3 percent growth rate while generating annual revenues of $12.8 billion, a report by the Denver research firm of Browne, Bortz & Coddington concluded.

The industry also created one percent of new U.S. jobs since 1986 and increased its contribution to the gross national product by 28 percent, or $32 billion. The study also said that cable television will provide 490,000 jobs in 1988 and generate $14.2 billion in income.

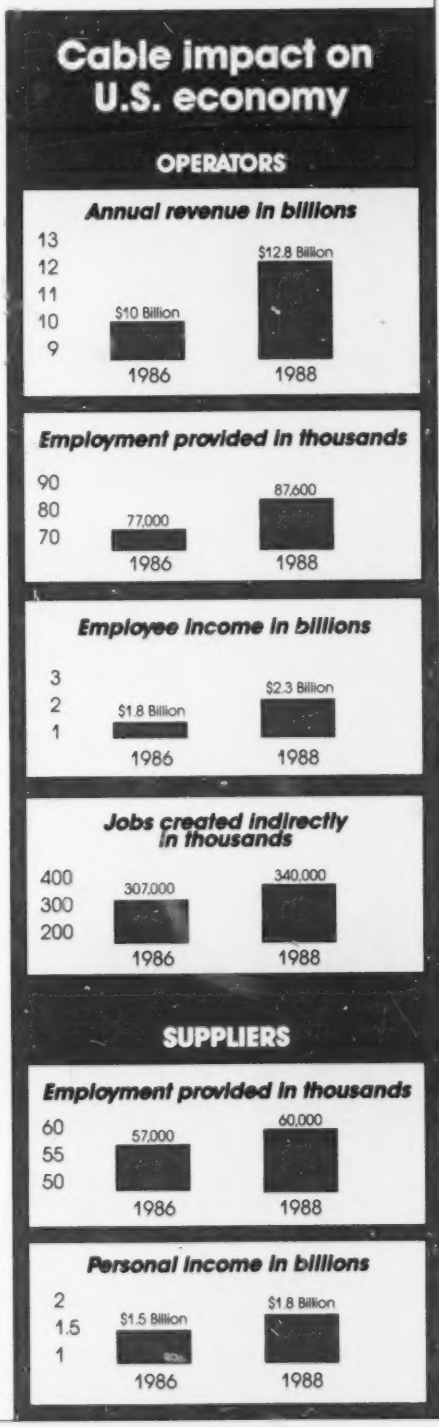
The study, *Impact '88*, updates a similar report released in 1986. Both reports were commissioned by Daniels & Associates.

The latest study reports that since 1980 gross cable television network advertising revenues increased from $50 million to a 1988 projected total of $1.6 billion. Meanwhile, cable industry suppliers, which include construction, manufacturing, transportation, communications, public utilities, wholesale and retail trade, added personal income of $1.8 billion and 60,000 related jobs. Direct cable operator employment has increased by more than 10,000 jobs since 1986, while total cable related employment increased more than 10 percent, or nearly 50,000 jobs.

Jack Pottle, the chief author of the study, said that the cable industry "should grow much more rapidly than U.S. industry as a whole, but is not likely to continue growing at its current rate because of its maturity."

However, one of cable's more significant contributions to the nation, the report said, is that it provides television programming to households that cannot otherwise receive it and offers new program choices for all subscribers.

"Because of cable television, no one is a second-class citizen. People in hamlets across the country have as much television as New York and other large cities," said Bill Daniels, chairman of Daniels & Associates. A top priority for the industry now, according to Daniels, is service. "Service must improve, and it is improving, but we have a long way to go. We're still a very young industry and have lots to learn."



At present, more than three out of four cable subscribers have access to 30 or more channels; 15 percent can receive 54 or more. Cable originated programming now constitutes nearly 40 percent of viewing in the average cable home and 45 percent of viewing in homes with one or more premium cable services, the report said. And on a national level, viewing of cable originated program services has increased by more than 50 percent since 1983, while viewing of network affiliated broadcast stations declined 12 percent in the same period.

The explosive growth of cable since 1980 is also reflected in the report, from $2.9 billion in revenues in 1980 to $11.3 billion in 1987, a 21.4 percent increase. Revenue growth for other media and communications industries were: telephone/telegraph, 11.1 percent; newspapers, 8.4 percent; periodicals, 9.6 percent; broadcast television, 11 percent; radio, 10 percent; motion picture box office, 6.5 percent; and home video, 58.3 percent (growing from .4 percent to 6.3 percent since 1981).

And, according to the study, prospects for future cable revenue growth remain excellent. Industry projections for 1990 average about $16 billion, or 25 percent above the 1988 level, while a $20 billion industry total is likely within five years.

The industry also has emerged as a major fund-raising vehicle, the report added. Live Aid, Farm Aid, Comic Relief and other efforts generated almost $100 million in donations, while the industry also undertook literacy campaigns, Muscular Dystrophy Association and Special Olympic programs.

The report went on to say that the number of cable subscribers has more than doubled since 1980, while industry revenues have climbed by a factor of four (more than 20 percent compounded annually). From that perspective, the gross national product, the most commonly used measure of overall economic activity, increased just 7.9 percent annually over the same eight-year period. And, in relative terms, cable ranks well behind the telephone, newspaper and periodical businesses, but well ahead of motion picture box office, radio, home video and all three components of broadcast television advertising (network, national/regional spot, and local).

Cable viewing has increased more than 50 percent since 1983 while viewing of network affiliates declined by 12 percent, the study said. ■

Subscriber Count

Satellite national services

Basic services	Affiliates	Subscribers
ACTS Satellite Network	352	6,546,800
Alternate View Network	247	3,000,000
America's Value Network	1,557	6,000,000
Arts & Entertainment (A&E)	2,500	30,000,000
Black Entertainment Television (BET)	1,000	18,500,000
Cable News Network (CNN)	11,823	45,186,000
Cable Value Network	1,700	19,000,000
CBN Cable Network	8,122	40,047,200
C-SPAN	2,900	37,300,000
C-SPAN II	490	14,200,000
Country Music Television	714	7,100,000
The Discovery Channel	3,000	30,300,000
ESPN	19,123	47,000,000
Eternal Word Television Network (EWTN)	447	9,400,000
FamilyNet	47	1,200,000
The Fashion Channel	600	10,100,000
Financial News Network (FNN)	1,920	28,200,000
FNN/Score	1,150	19,800,000
FNN/TelShop	900	11,600,000
Galavision	300	1,000,000
Headline News	3,801	30,124,000
Home Shopping Network	1,270	14,636,087
Home Shopping Network 2	295	5,112,658
The Inspirational Network (PTL)	930	10,300,000
International Television Network	56	7,868,900
The Learning Channel	1000	12,000,000
Lifetime	3,800	39,000,000
Mind Extension University	83	1,200,000
Movietime	130	5,500,000
MTV	4,780	40,300,000
The Nashville Network	7,141	41,136,980
National Jewish Television (NJTV)	295	6,800,000
Nick At Night	3,165	34,600,000
Nickelodeon	5,955	39,000,000
The Nostalgia Channel	185	2,500,000
Prevue Guide	105	2,100,000
QVC Network	857	11,800,000
Shop Television Network	100	3,600,000
Silent Network	380	10,300,000
Tempo Television	750	12,000,000
The Travel Channel	300	9,000,000
Trinity Broadcasting Network	588	8,522,000
USA Network	10,100	43,400,000
Video Hits One (VH-1)	1,930	25,700,000
The Weather Channel	3,200	34,300,000
WGN-TV	11,071	24,653,463
WWOR-TV	2,293	9,657,482
World Access Television	750	12,000,000
WPIX-TV	858	9,678,474
WTBS-TV	12,715	44,300,000

Pay services		
American Exxxtasy	35	25,000
American Movie Classics	1,500	11,000,000
Bravo	350	1,300,000
Cinemax	3,650	5,100,000
The Disney Channel	5,000	3,810,000
Festival	N/A	42,500
Home Box Office (HBO)	6,700	15,900,000
The Movie Channel	3,250	2,600,000
The Playboy Channel	600	500,000
Showtime	3,200	5,700,000

Audio services		
Cable Radio Network	49	1,566,736
KKGO Super Jazz	18	133,639
Moody Bible Institute	63	1,058,368
Satellite Radio Network	237	483,000
Seeburg Lifestyle Music	142	2,576,838
Seeburg Lifestyle Adult Contemporary	26	854,390
Tempo Sound	125	1,250,000
WFMT Chicago	170	1,259,804

Text services		
AP News Cable	185	2,500,000
AP Business Plus	54	1,400,000
AP News Plus	75	2,100,000
Cable SportsTracker	41	875,000
DBC/MarketWatch	462	9,200,000
Electronic Program Guide (EPG)	390	9,200,000
EPG Jr.	156	180,000
Genesis Cable Storytime	39	1,550,000
Reuters News View	127	2,437,000
X*Press Executive	350	4,000,000
X*Press Exchange	350	4,000,000

Non-satellite-fed national services

Bicycled services	Affiliates	Subscribers
Cable Video Entertainment	195	15,000,000
Fuji Network	3	12,000
Nippon Golden Network	3	13,000
Telaction	1	4,000
Vector Consumer News	8	200,000
Vector Consumer Shopping Guide	9	325,000

Regional entertainment services

Basic services	Affiliates	Subscribers
Atlanta Interfaith	7	180,000
Bay Area Religious Channel (BARC)	6	113,000
Buffalo Sabres Hockey	6	455,000
Cable TV Network of New Jersey	34	1,396,451
The Ecumenical Channel	9	170,000
KTVT	415	3,588,270
Life Newsvision	35	50,000
Madison Square Garden	106	2,300,000
Meadows Racing Network	11	600,000
News 12 Long Island	4	532,000
Prime Cable	9	381,938
Prime Ticket	55	2,300,000
SportsVision (Chicago)	50	1,300,000
The Sunshine Network	107	1,500,000

Pay services		
Home Sports Entertainment Houston/Dallas	181	645,815
Home Team Sports	114	719,000
New England Sports Network	160	262,138
PRISM-Philadelphia	87	422,329
Pro-Am Sports	140	301,000
SportsChannel (Florida)	10	470,000
SportsChannel (New England)	147	911,829
SportsChannel (New York)	94	1,100,000

Note: Figures for affiliate and subscriber counts will be updated quarterly unless information is provided by the service. Send information to: *CableVision*, Attention: Candace Drake, Cable Stats, 432 Park Avenue South, Suite 1010, New York, NY 10016.
N/A denotes information not available.
TBA denotes to be announced.

Announced services

Satellite-fed services	Expected launch
American Man's Network	2/89
ATV:Advertising Television	10/88
Cable TV and Appliance Network	6/88
CD/8: The Digital Music Network	9/88
Interactive Game Network	3rd Quarter 1989
Kids Information Network	6/88
The Landscape Channel	4th Quarter 1988
Laugh TV	3rd Quarter 1988
Main Street	4th Quarter 1988
Show Business Today	1/89
TNT	10/88
Visions Interface Satellite Network	9/88
Wingtips	3rd Quarter 1988